CALIFORNIA ENERGY COMMISSION

California Energy Commission

Work Tracking System (WTS)

User Guide

February 2, 2012

Gerald Brown Jr., *Governor*

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Introduction to Work Tracking System (WTS)

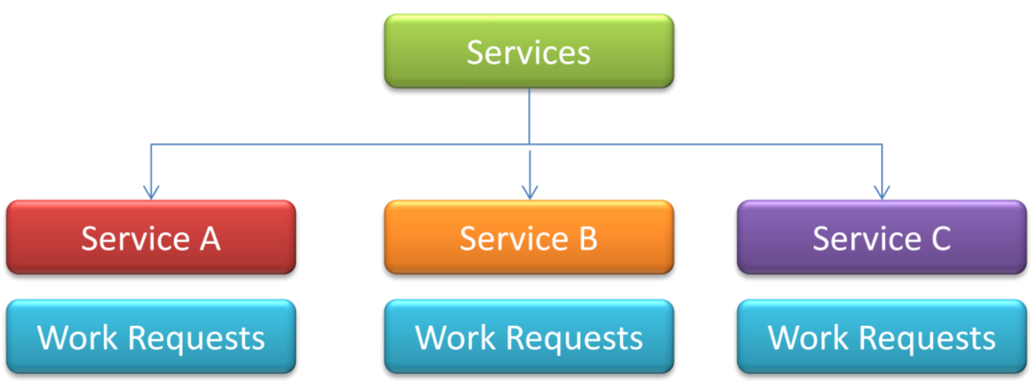
Overview

The California Energy Commission Work Tracking System (WTS) is a central database to track the work requests for business applications, services and other general requests made to or within the Energy Commission. It can be access using Microsoft Internet Explorer via EnergyNet and via individual application links to WTS. WTS provides features to allow personnel who manage these work requests to assign tasks to staff and keep track of status of work in progress and work request backlogs. The system is very simple and straightforward and only tracks basic information about each request. As such, the individuals involved in each work request are only required to enter and maintain minimal information. WTS does not enforce any sort of policy or project management methodology. Creation of work products and deliverables will continue to be done independently of WTS.

A benefit of WTS is that it allows responsible managers to review, prioritize and assign work items. It provides a method of organizing work requests by priority and by functional area. This will facilitate better communication with staff and division managers about current activities.

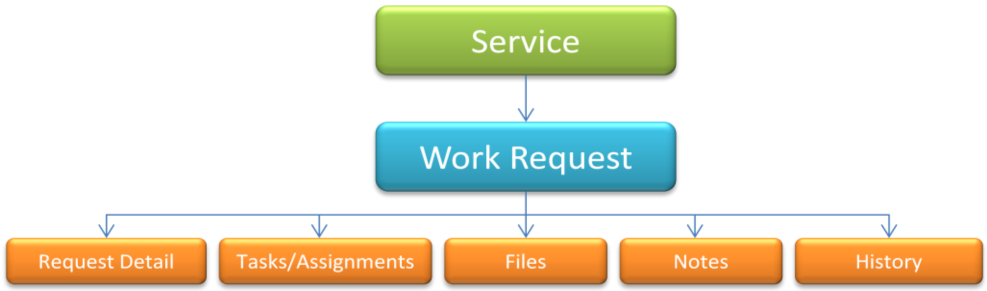
Services

WTS uses the concept of **services** to organize work requests into different groups. A service can be thought of as a category of work or a service one group is providing to another. For example, Program Information Management System (PIMS) is a type of service. All work requests relating to PIMS can be grouped together in WTS. Another service is Web Ex Conferencing. All work requests relating to Web Ex can be grouped together in WTS. Because WTS is a general work tracking system, it isn't limited to IT projects/services only. It can be used as work tracking system for other more general categories. With this, non IT divisions and offices may elect to track their work items/assignments also using this application.



Work Requests

A **work request** is a documented statement of work that needs to be reviewed and completed. The work could be anything, from a programming task, a document review task, a training task, a support task or any other sort of task where a work product is produced or a need met. It describes what category or service the work is related to, it describes what is needed, when it is needed, who is requesting the work, the priority of the request and other attributes. It also contains additional information about the request as it is later assigned and completed. The following shows the elements of a Work Request.



Work requests can be initiated from staff or managers at all levels[1]. In addition, individuals who manage services can assign work requests to individuals in the Energy Commission.

Using WTS

Energy Commission staff will have varying roles and purposes using WTS. Not everyone will use the system in the same way. In some cases, individuals will use the system in several of the following ways. The main roles are:

1. **Requestors** – individuals requesting some element of work relating to one of the Energy Commission applications, services or projects. This includes individuals making requests on behalf of their workgroup, office or division (liaisons).
2. **Assignments –** individuals asked to complete work requests assigned to them.
3. **Service Managers** – service managers, project managers or others who are responsible for the tracking, prioritizing and assigning of work requests related to their area of responsibility.
4. **WTS Administrators** – individuals who maintain the WTS system setup and configuration of all the service categories and options.

[1] Based on a person's profile and association with the service categories.

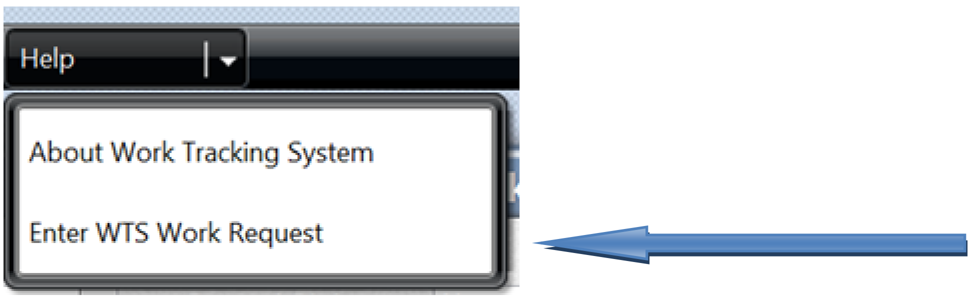
Requestors

Overview

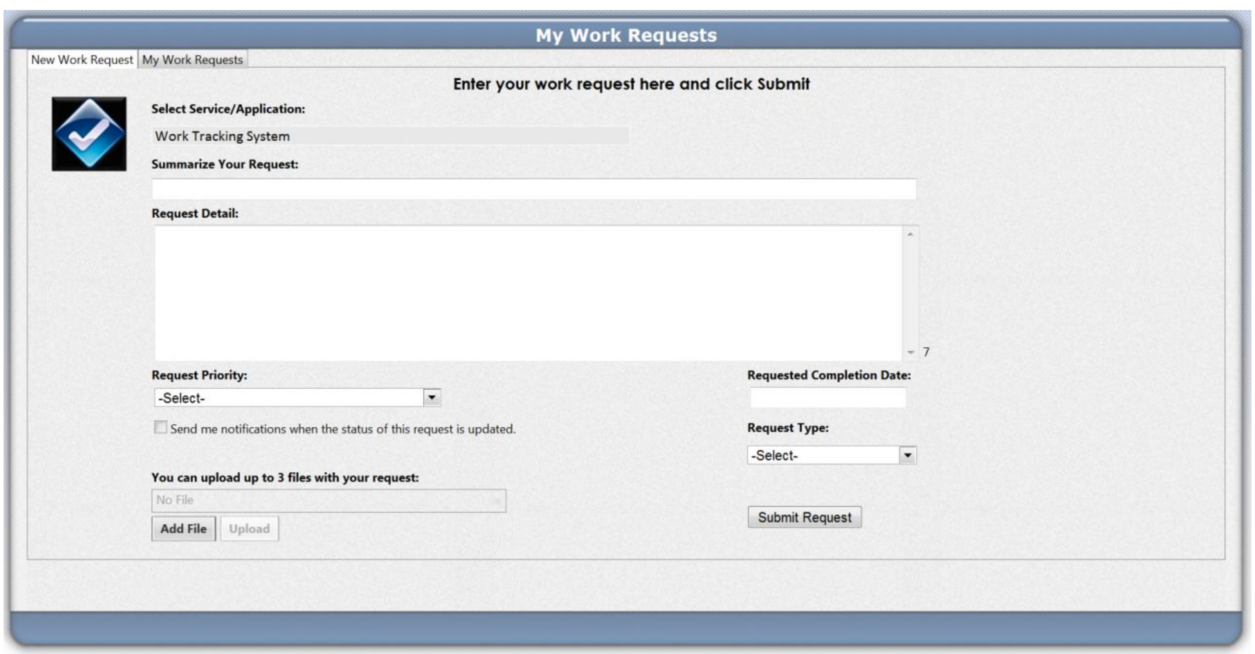
Energy Commission staff from time to time will make requests via WTS. These requests may be related to a number of services or categories. WTS allows you to quickly enter a new request, and it also allows you to view your prior requests.

Entering a Work Request

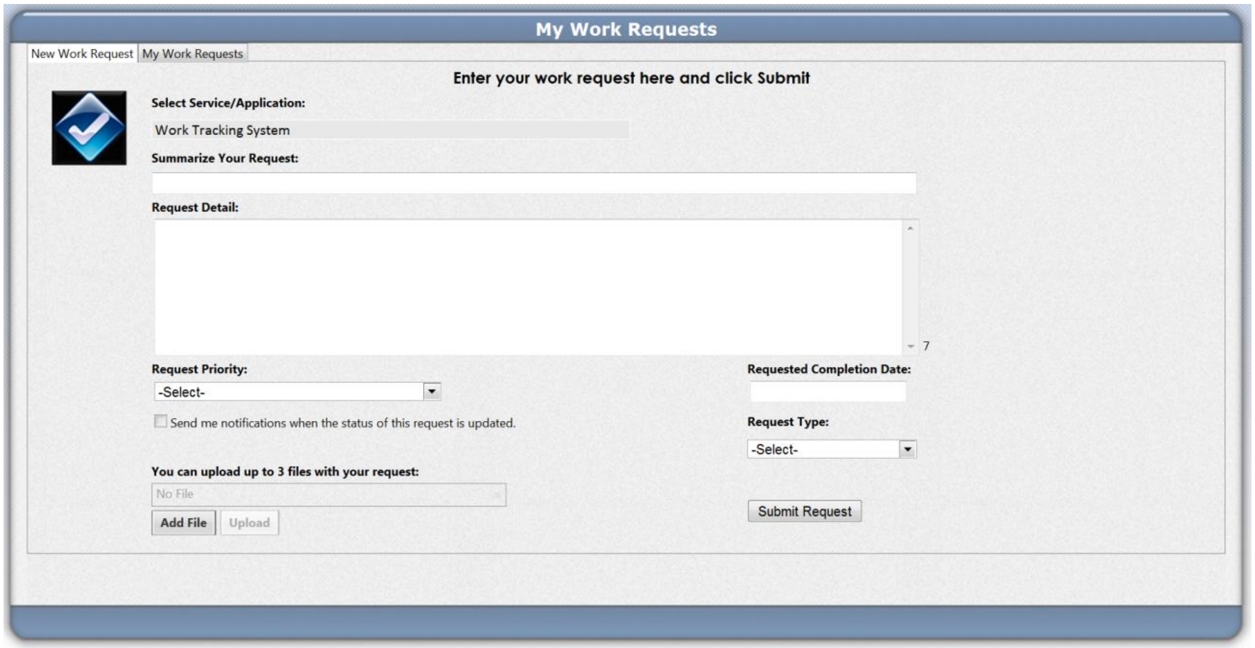
As the Energy Commission services adopt the use of WTS to track their requests, they will add a link on their website for end-users to enter a work request. A work request can be a variety of different things, from report requests, requests for assistance, to report a problem or data issue, requesting new features, etc. For example, to enter a work request about WTS itself, the link will show like this:



After selecting "Enter WTS Work Request", the following screen will appear:



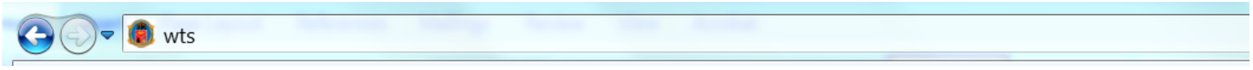
A ***Work Request*** is a statement of something that is needed relating to a particular service or category. It is important to describe what is needed such that the service manager or other manager responsible for reviewing the request can understand what is being asked for and when it is needed by.



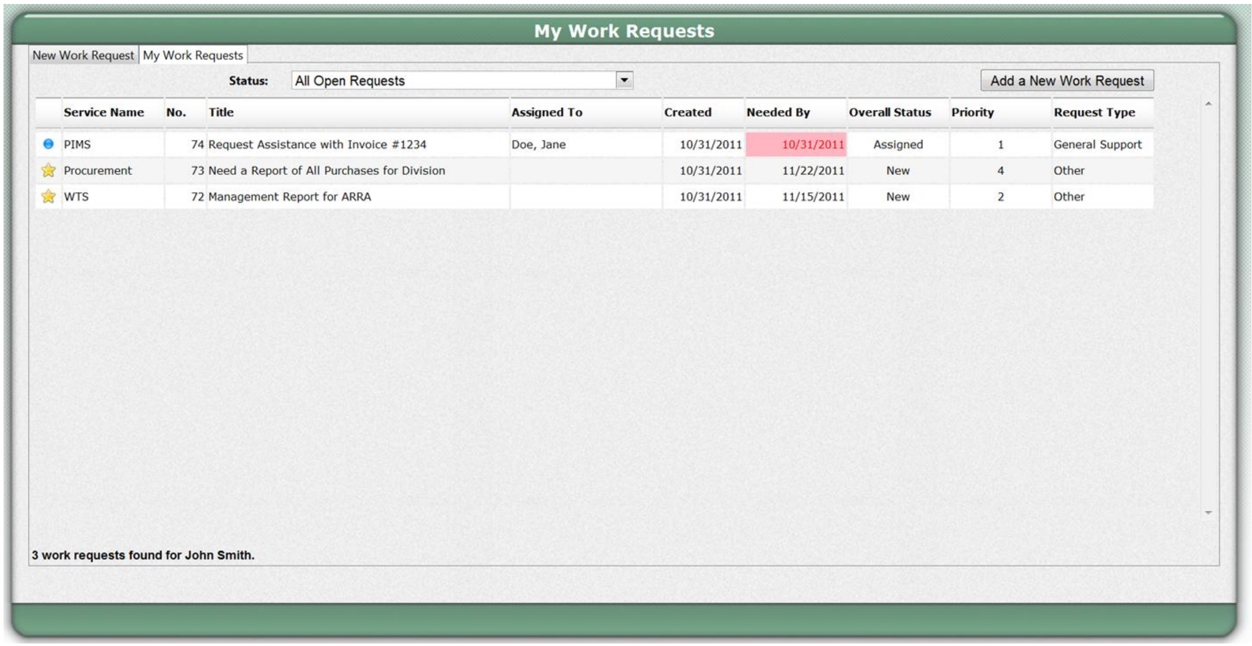
1. **Service/Application** - if making a request for a specific application/service, the Service Name will be automatically filled in for you. You do not need to enter anything in this case. If a drop-down list appears, simply select the appropriate service for which you are making a request.
2. **Summarize Your Request** - summarize what is needed in a few words.
3. **Request Detail** - enter additional details about your request, making sure that the person receiving the request will understand what it is you need done, or are suggesting. If your requests relates to something specific, like an agreement or invoice, please be sure to specify numbers and/or other references.
4. **Request Priority** - from the drop down list, select the priority that best describes the urgency of your request.
5. **Requested Completion Date** - if the request must be completed by a certain date, or there is a desired date for the completion, you can enter that date here. Note that there is no guarantee that this request can be completed in the timeframe requested. It depends on other work priorities and resources available, as well as time needed to complete the request. It is not required that you enter a date.
6. You can upload up to 3 files with your request if these files provide additional documentation relevant to the request. To upload files, click “Add File”, then browse for and select the file up to three times. Once done, click “Upload” to transfer the files.
7. **Request Type** - from the drop down list, select an appropriate type of request. If you are uncertain you do not have to select a choice.
8. Once you have entered your request, click “***Submit Request***”. This will save your request to the database and switch you to the next tab at the top of the screen called “My Work Requests” where you will see your new work request at the top of the list followed by previous work requests you have entered.

Your Work Requests

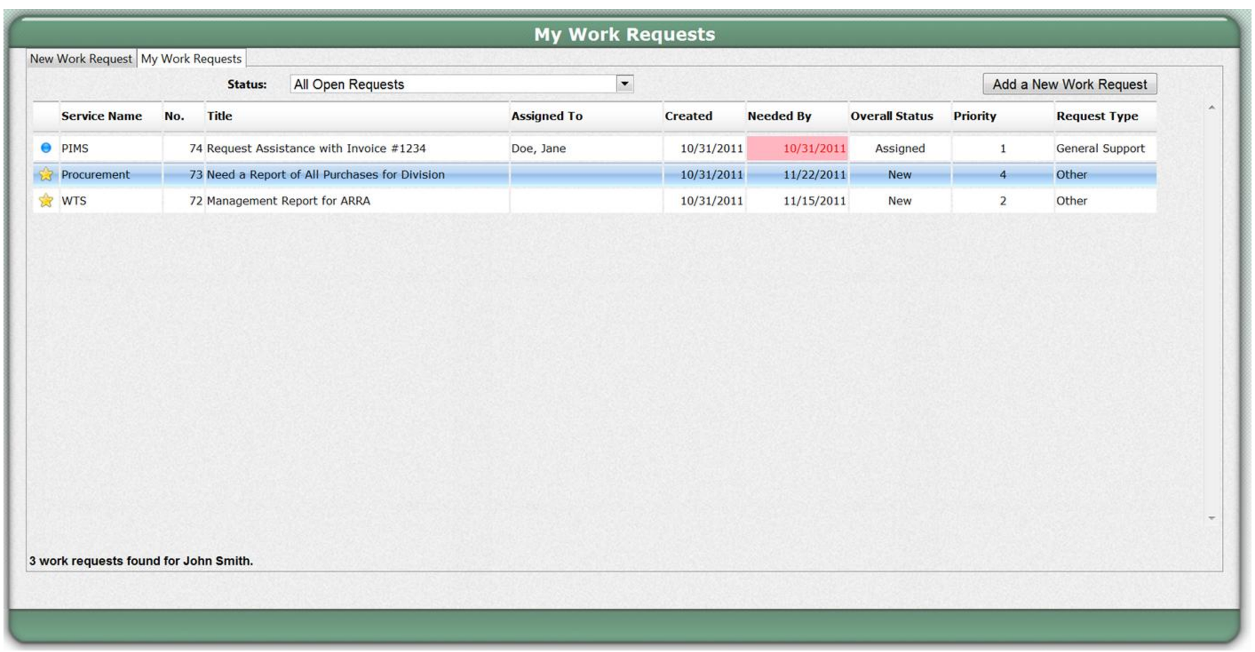
WTS keeps track of all your work requests. You can access WTS and the list of your work requests simply by typing “WTS” in the address bar in Internet Explorer, like this:



WTS will know who you are and display your list of work requests similar to the following example:



To review the details of one of your work requests, move your mouse over the row you want to view. When highlighted in blue, click to view details.



Assignments

Assignment Email Notification

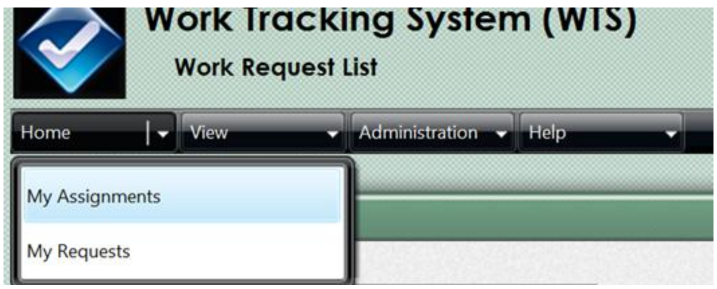
If you are assigned to a work request you will receive an email notification with details of the work request and a link back to WTS to view/edit the work request. The email notification will be from the person that made the assignment to you. If you have questions/concerns about the assignment, please contact the assigning person.

Since each Application/Service can customize the email notifications that are sent, the content may vary on assignment emails.

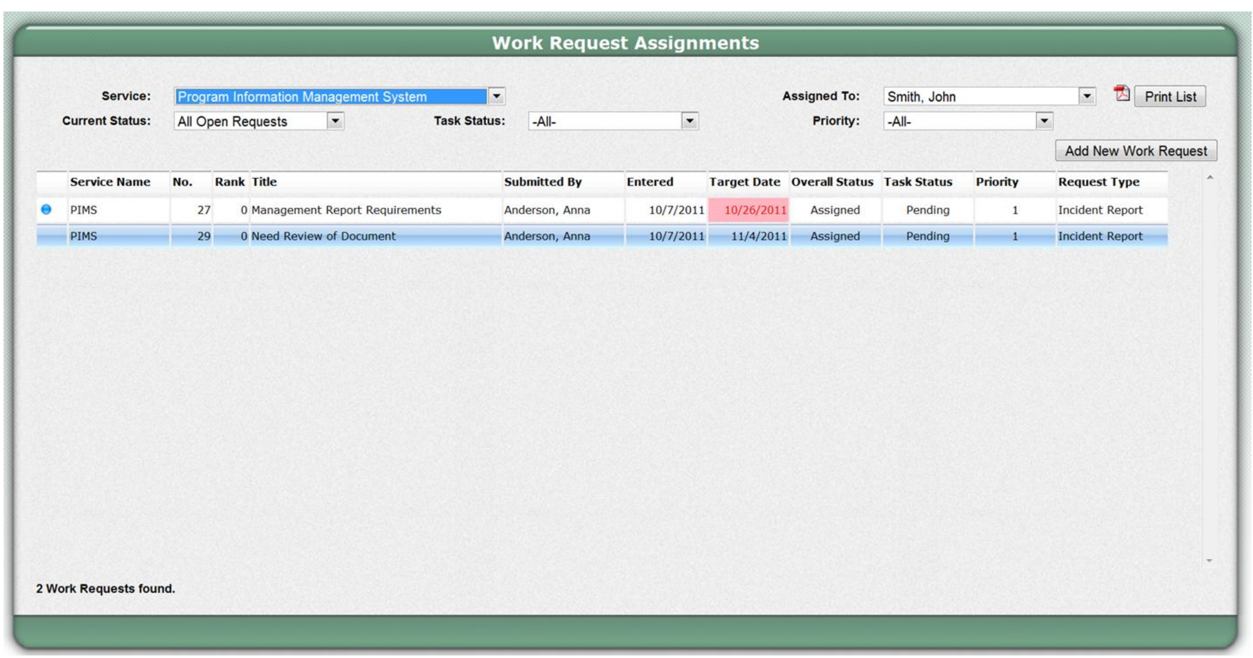
Viewing/Updating the Work Request

There are two ways to access work requests assigned to you:

1. Click on the link in the email you received that assigned the work request to you, or
2. Go to WTS (type WTS in your Internet Explorer address bar). In some cases, your assignments will be your home screen in WTS. If not, go to Home->My Assignments to see work requests assigned to you.



Your assignments page will look similar to this:



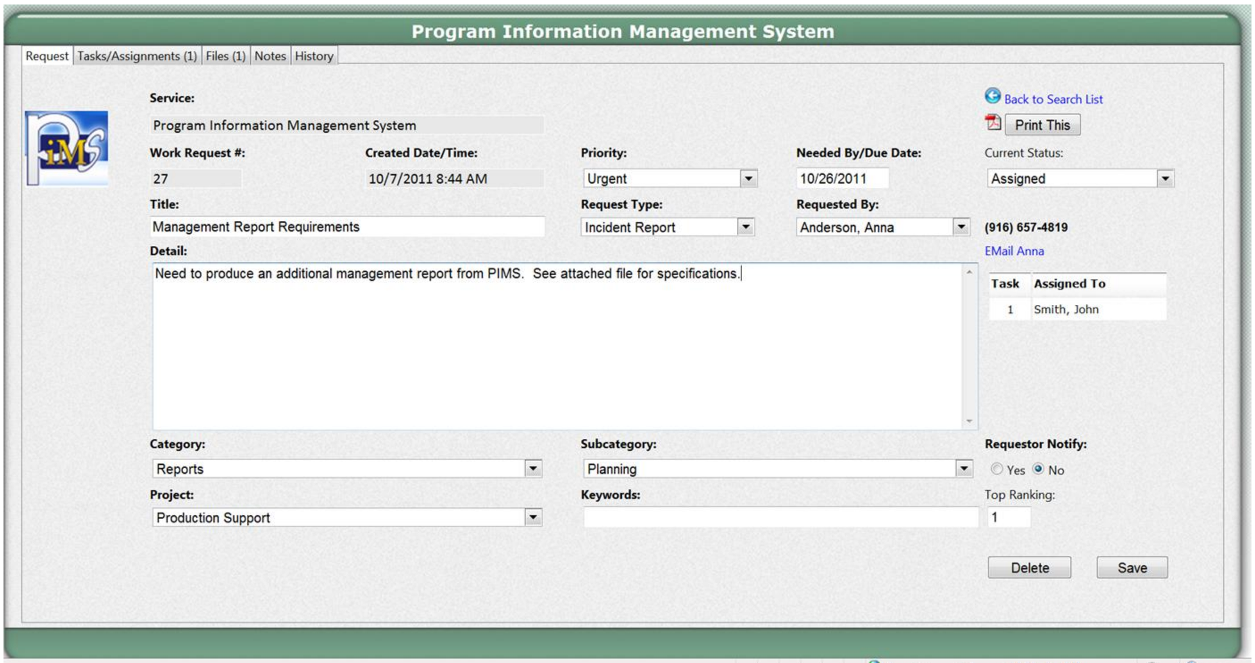
To review and/or update an assigned work request simply mouse over the request and click to view the details screen.

Work Request Details

As an assignee of a work request you can enter/update any aspect of the request. Sometimes additional information is entered or edited on the request details page as the request is clarified or documented. As the assignee, you are responsible for maintaining an up to date status on the progress of the request.

The work request details screen is shown below:

Request Tab



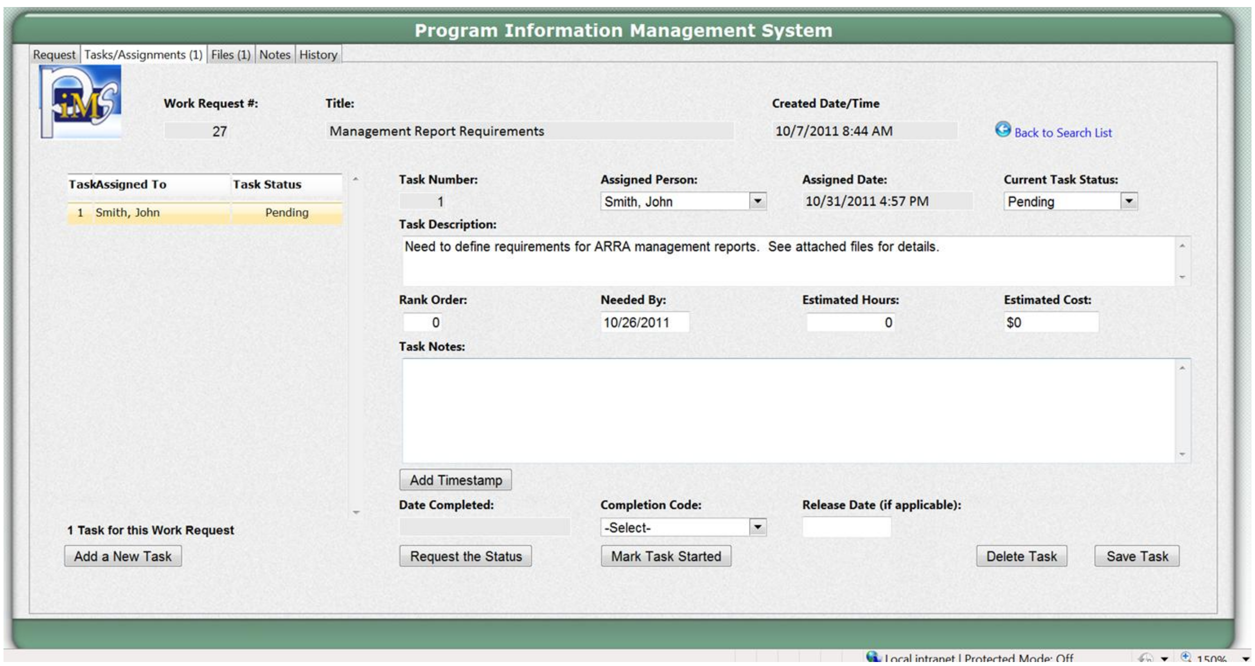
1. Each work request has several tabs (pages). Note, the numbers in parentheses indicate the number of items on the page.
    a. Request
    b. Tasks/Assignments
    c. Files
    d. Notes
    e. History
2. **Service** - Name of the service/category to which this work request applies. Once selected, it cannot be changed.
3. **Print This** - button to create a PDF document of this specific work request.
4. **Work Request #** - system assigned and unique across all work requests.
5. **Created Date/Time** - date and time the work request was originally entered.
6. **Priority** - current priority assigned to this work request.
7. **Needed By/Due Date** - if applicable, the date the overall work request needs to be completed by.
8. **Current Status** - current overall status of the work request (note, individual tasks have their own status codes), this code represents the work request as a whole.
9. **Title** - summary of this request.
10. **Request Type** - type of request, which varies by service.
11. **Requested By** - name of person that made this request. Note, following the requestor name is the requestor's phone number and email link. This can be used to contact the requestor if additional information is needed.

12. **Details** – specifics of the work request.
13. Current assignment(s). Note, refer to Tasks page for making/changing assignments.
14. **Category –** select category of this work request. Categories vary by service. Select the most appropriate. If additional categories are needed contact the Service Manager.
15. **Subcategory -** select appropriate subcategory for this work request. This is used later to group requests.
16. **Requestor Notify** - this button is used to notify the requestor (via automatic emails) of any updates to status on their work request.
17. **Project** - select project, if any, this work requests is in support of.
18. **Keywords** – Optional field. Enter any keywords. These can be used later for searching for work requests.
19. **Top Ranking** is used to identify high priority work requests, and rank them, i.e., Top Ten. This is not a required field.
20. If changes are made, click **Save** to save your changes.

Tasks/Assignments Tab

Each work request can have 1 to many assignments/tasks. By default, one task is created for each work request. Service managers are responsible for assigning the work requests to individuals for completion, but once assigned, individuals assigned can add additional tasks/assignments, or even reassign the work request as needed. The system does have any specific business rules on this and it is up to the individuals involved to keep the information is the system up to date and informative to others who have overall responsibility.

The Tasks/Assignments tab is shown below with an explanation for each field:

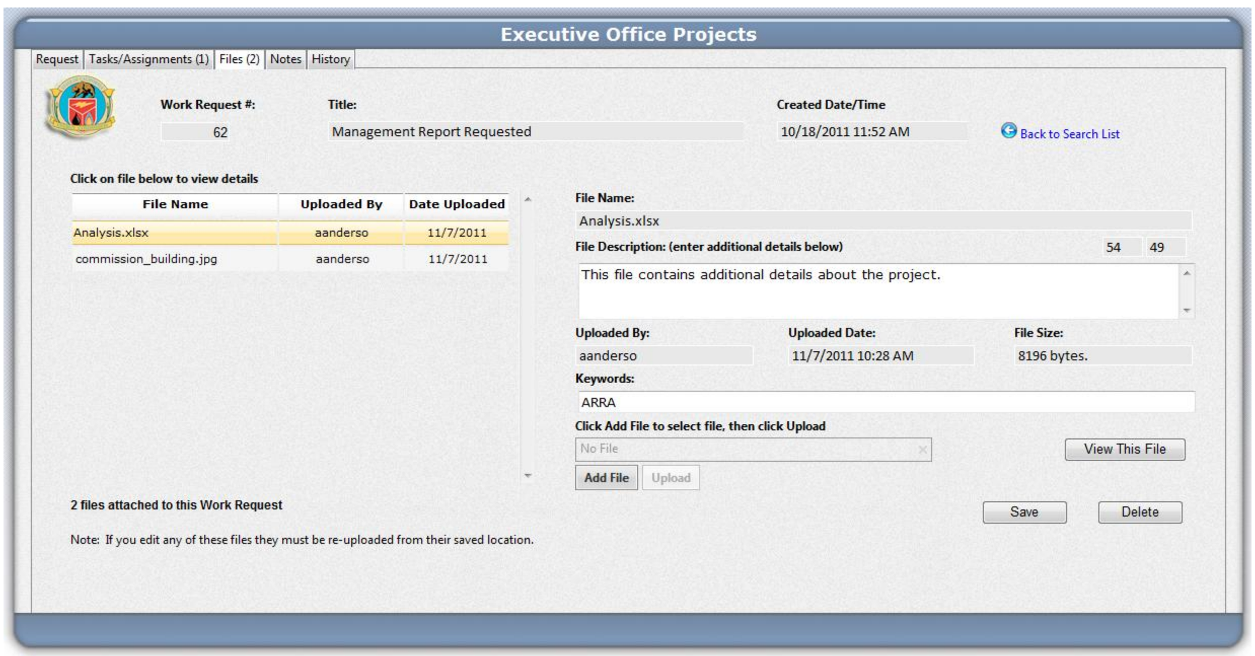


1. On the left side of the screen is a list of all tasks for this work request. Mouse over a task and click to select it for display on the right side of screen.
2. **Task number** is display only and is automatically assigned in sequence by the system.
3. **Assigned Person** - use drop down list to assign or reassign a task.
4. Assigned Date is date and time this task was assigned.
5. **Current Task Status** - each task can have a separate status code as some tasks can be complete, in progress, etc. If you choose to delegate this task, mark the task as delegated, then add another task(s) to assign work.
6. **Task description** - defaults to work request details but can be modified on a task by task basis.

7. **Rank order** is a relative priority as assigned by the Service Manager if applicable. Usually, tasks should be worked in the order they are ranked. The use of this field may vary by service. Generally, the lower the rank, the higher the priority.
8. **Needed by** date defaults to the needed by date of the overall request, however can be modified such that each task can have its own due date or date the tasks should be completed by.
9. **Estimated hours** and **estimated costs** are optional fields that can be completed if required.
10. **Tasks notes** are used to record additional notes, comments, progress, etc. on this particular task. This is useful in tracking activity on a task. Click the **Add Timestamp** button to insert a date/time label for continuous notes. Also, the "**Notes**" tab can be used to record overall notes for the Work Request.
11. **Completion Code** - when a task is completed, please select a completion code that best describes the solution that was implemented. This information is used later for work request statistics. This field is required only when marking a task as complete.
12. **Release Date** - if task involved releasing of some deliverable, indicate the release date. This is an optional field.
13. Click **Add Task** to add another task to this work request. Use this feature where a work request needs to be broken down into sections, or has multiple assignments.
14. Push the Request the Status (keep or defer?).
15. Use the "**Mark Task Started**" button to quickly change the task status from Pending to In Progress.
16. If changes are made to the task description, notes or any other field, click "Save Task" to save the changes to the database.

Files Tab

The files tab is used to upload and view files associated with this Work Request. Once uploaded, files are stored in a database, rather than on a network drive. The maximum file is 10 Megabytes.



The left side of the screen displays a list of files that have been uploaded for this Work Request. Mouse over a file and click to see details on the right side of the screen.

File Name – is the name of the uploaded file, this field cannot be changed.

File Description – you can enter additional information about the file, describe it's content or purpose with this Work Request.

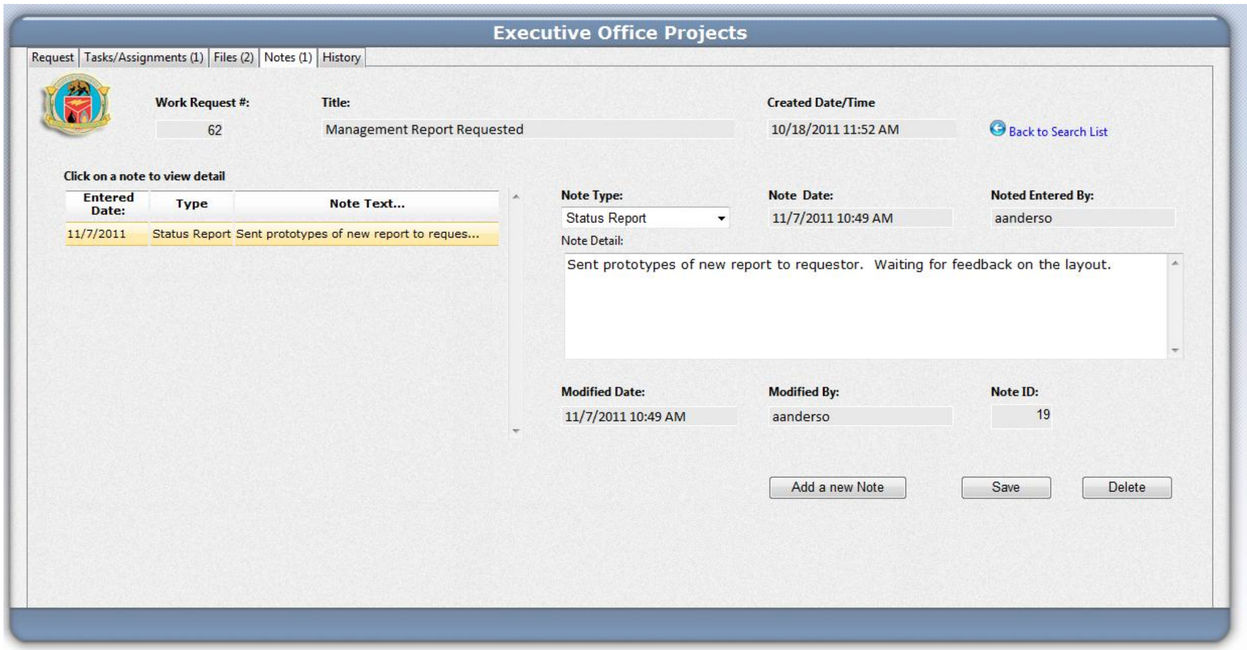
Uploaded by, upload date and file size are displayed for information only and cannot be changed.

Keywords – Enter additional keywords about the file. This is optional and can later be used for searching for Work Requests related to keyword topics.

If you click on **View This File** the system will display the file using the appropriate program, like Word or Excel. Please note that when you view the file, you are downloading it from the WTS database to the Office program, like Excel. If you make changes, Excel and Word will only save your changes to the Windows File System (like your C: drive or other network drive), not the WTS database. Therefore, if you make changes, you must save them somewhere temporarily and then upload the file again to WTS once your changes are complete. If you upload the same file name, WTS will replace its version. If you want to keep versions, simply give the new version of the file a different name, and then upload it to WTS.

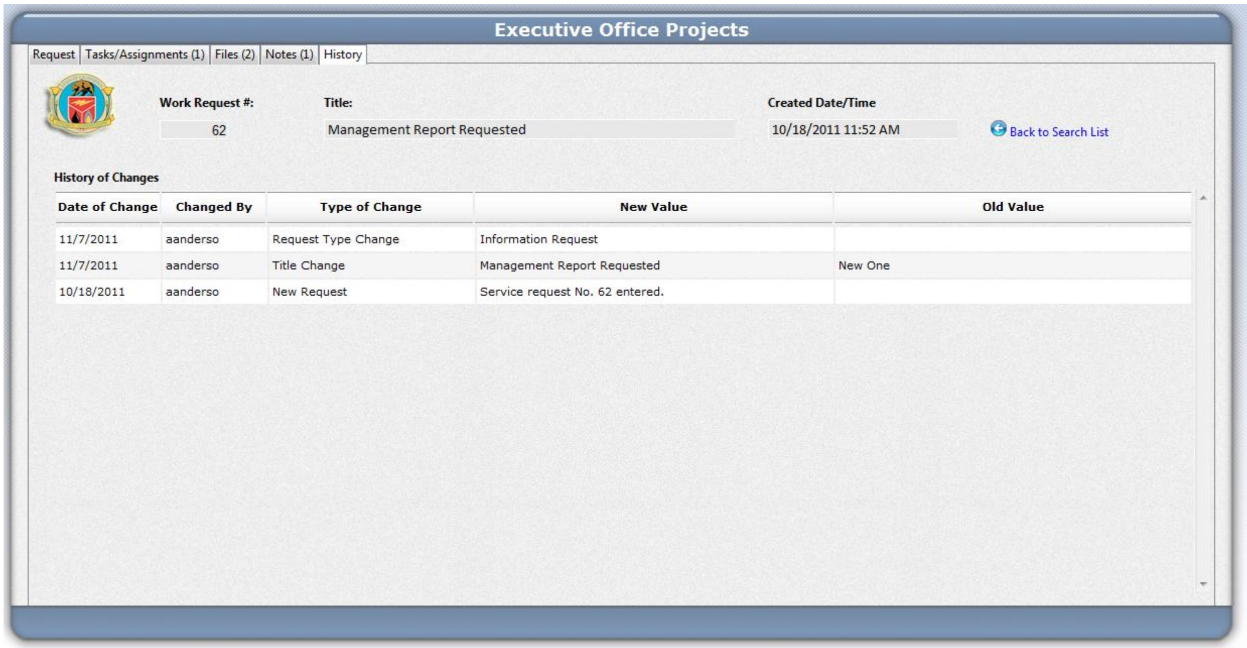
Notes Tab

Notes can be added to a Work Request at anytime by anyone with update rights for this request.



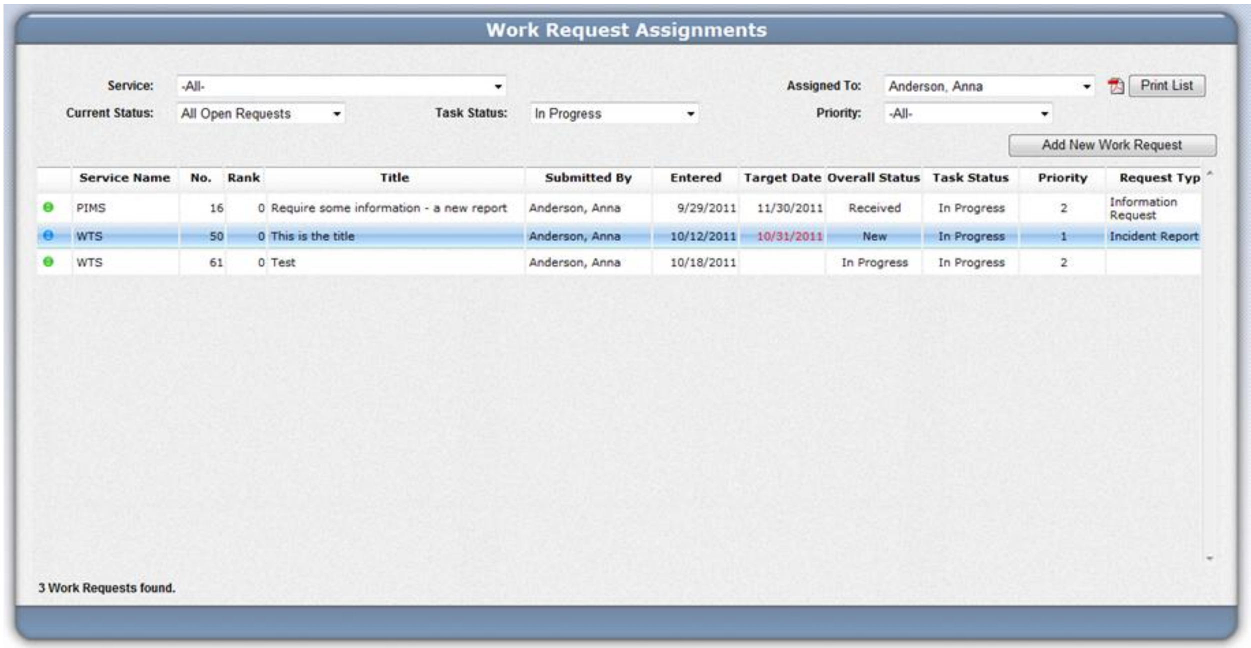
History Tab

The history tab is used to display changes to key elements in the work request. This screen is for information only. Only major changes are logged.


Executive Office Projects
Request
Tasks/Assignments (1)
Files (2)
Notes (1)
History
Work Request #:
62
Title:
Management Report Requested
Created Date/Time
10/18/2011 11:52 AM
Back to Search List
History of Changes
Date of Change | Changed By | Type of Change | New Value | Old Value
11/7/2011 | aanderso | Request Type Change | Information Request |
11/7/2011 | aanderso | Title Change | Management Report Requested | New One
10/18/2011 | aanderso | New Request | Service request No. 62 entered. |

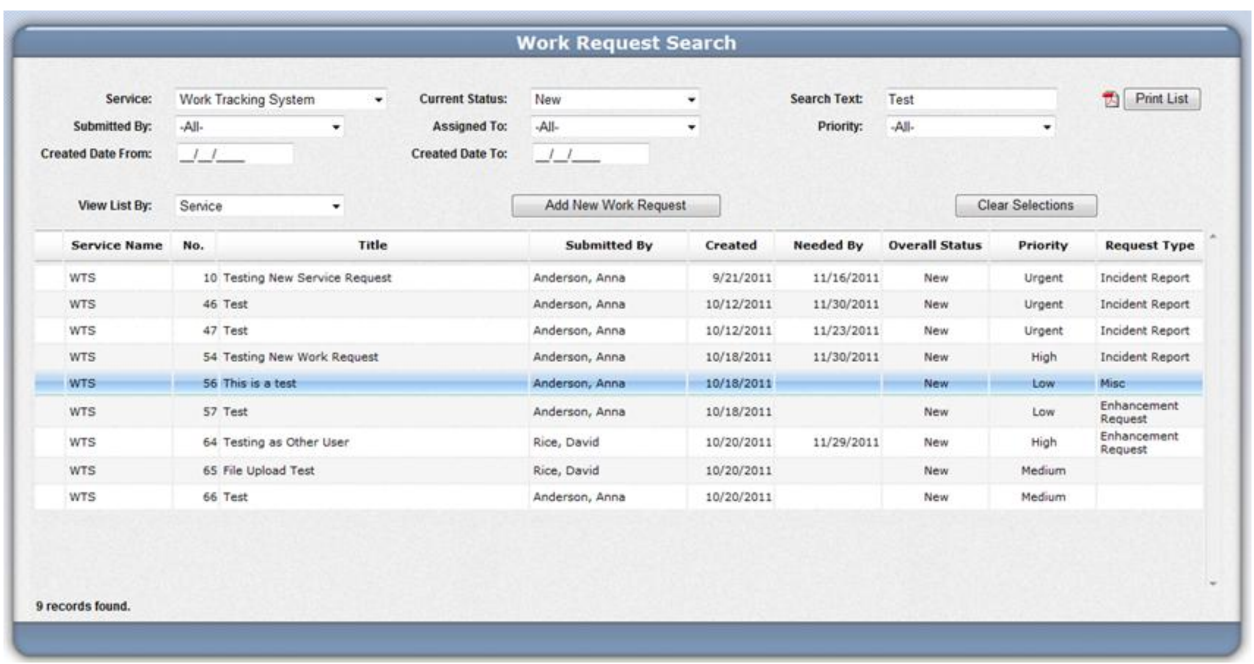
Assignments Home Page

You can view all work requests assigned to you via the Assignments Home Page, accessed from WTS via Home->My Assignments.



Work Request Search

If you are a service manager or other contact for a particular service, you can search/view Work Requests for your service(s). You cannot search/view work requests for services that you are not associated with. To view/search for work requests, from WTS go to View->Work Requests. You can adjust the search criteria at the top of the form. You can also print a report of the current list of work requests displayed.



Conclusion and Additional Resources

More information on WTS is available via the WTS System Overview document, as well as online training videos on using the system. These resources are available via EnergyNet -> need to get with Steve to set this up.